



How to import orders with Click & Drop Desktop

To use Click & Drop Desktop, you must use a computer or device running Microsoft Windows 7 or above.

The application requires 161mb disk space.

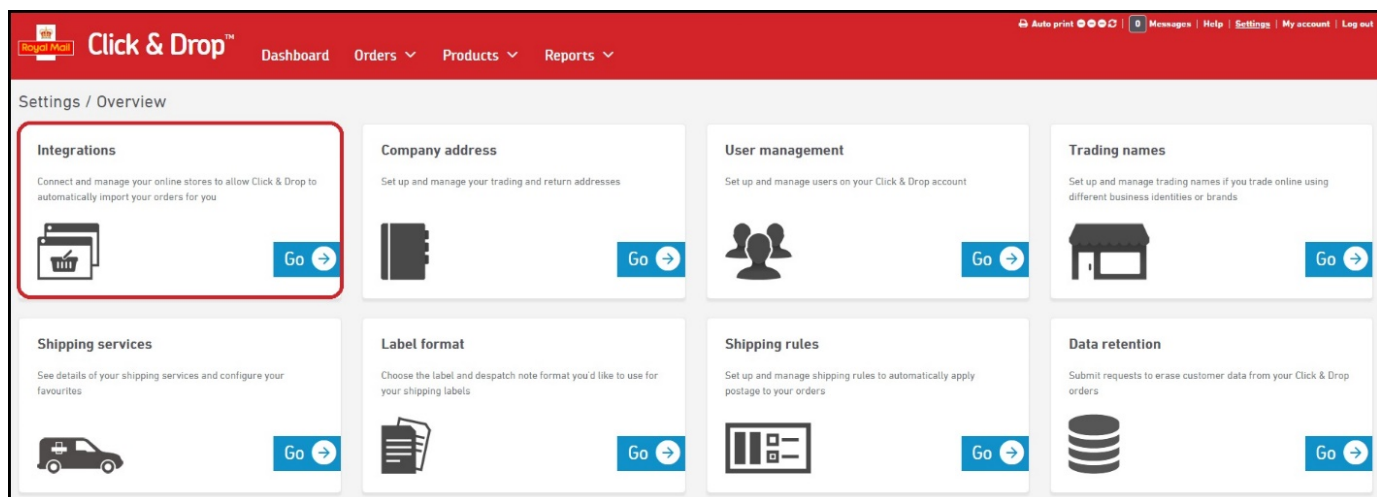
When you add a file into your designated folder, Click & Drop Desktop will upload your order data within seconds.

Creating & Installing a Click & Drop Desktop integration

To begin, click the 'Settings' link within Click & Drop:

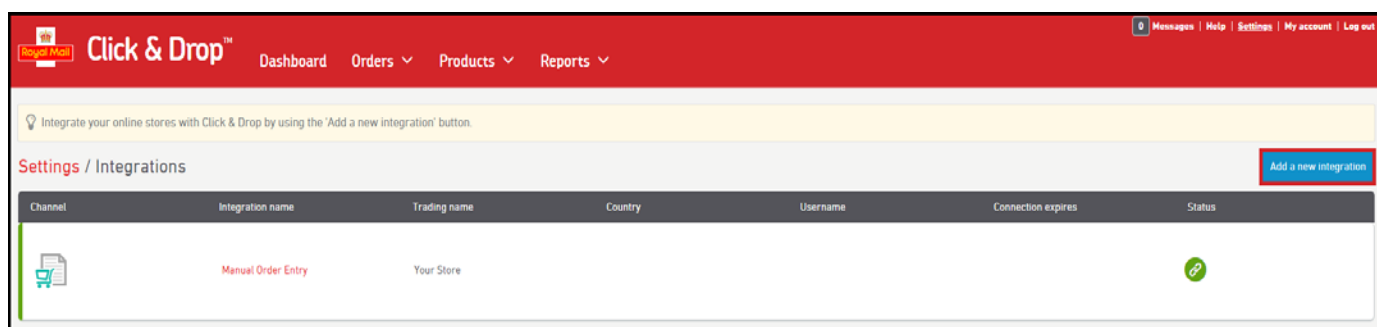


The 'Settings/ Overview' page will open. Click anywhere within the 'Integrations' tile.

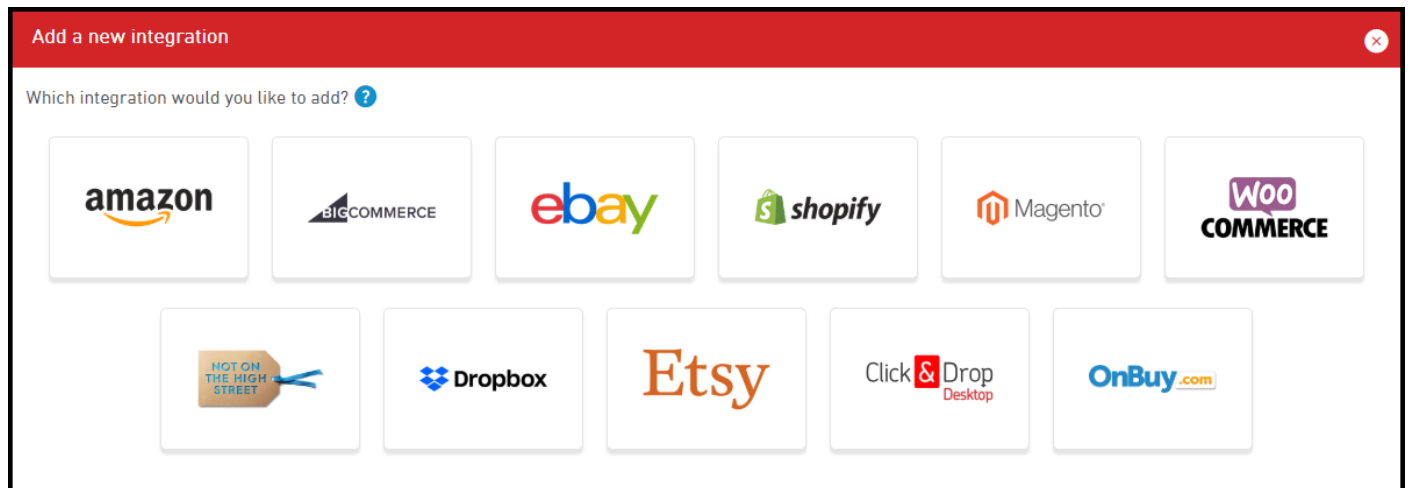


Your current integrations will be displayed.

Click the 'Add a new integration' button to begin connecting to Click & Drop Desktop.

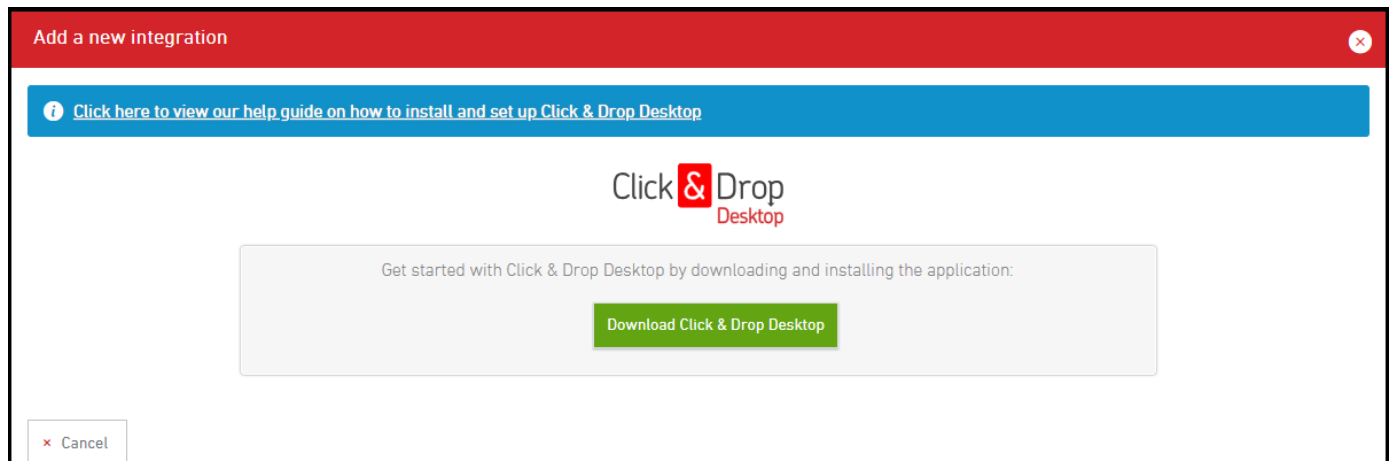


From the list of available integrations, click 'Click & Drop Desktop'.



A new window will appear. Click the green 'Download Click & Drop Desktop' button to begin the installation process.

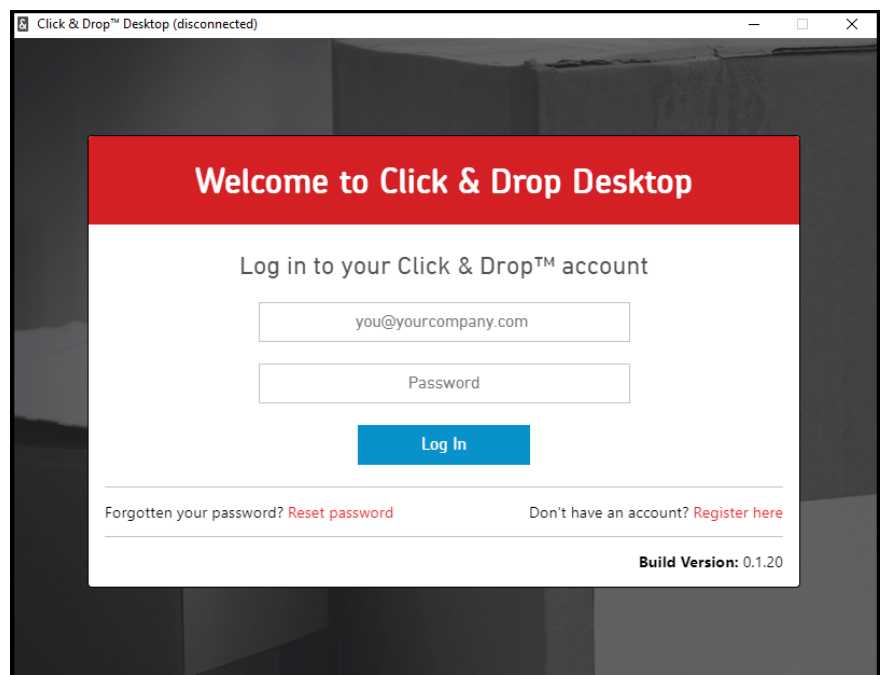
Please note that you will be required to download the Click & Drop Desktop application onto your machine. Currently, the application is only available for machines running Microsoft Windows 7 and above.



Once the application has downloaded, you will need to install it.

Once installed, the app will open.

To begin, you will need to log into the app using your Click & Drop account details.



Configure your integration settings

The first time you log into Click & Drop Desktop, you will be redirected to the Settings > Integrations page within Click & Drop, where you can configure the settings for your integration.

Trading name: Select your trading name from the drop-down list. If you only have one trading name, it will be automatically entered.

Integration name: Choose the name your integration will be displayed under within Click & Drop.

Print labels automatically after import: Check this option if you wish for your labels to be printed automatically. For this functionality to work, your orders must have weight, shipping service, and package size details. Additionally, you must have [Royal Mail Print Assist](#) installed and configured.

Upload labels: Check this option if you wish for copies of your labels to be saved into your 'Watch' folder.

Upload reports: Check this option if you wish for a spreadsheet file containing order data and tracking information (if applicable) to be saved into your 'Watch' folder.

Orders per printout limit: Please note that Click & Drop Desktop can only support files of 50 rows or less (51 if including a header). If your files are larger than this, you will need to split them.

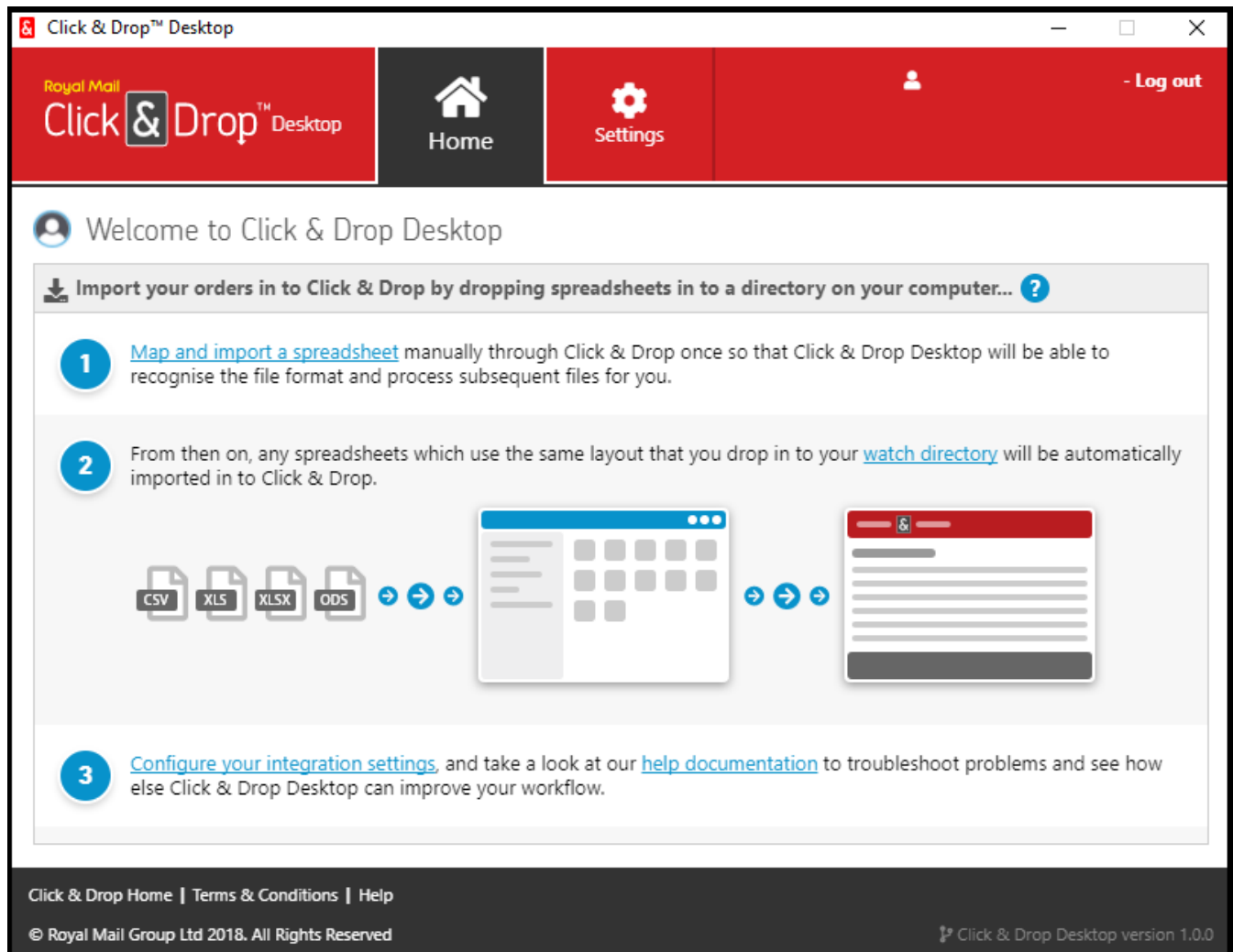
Click the 'Update' button when you are ready.

The screenshot shows the 'Settings / Integrations' page in the Click & Drop Desktop application. The page has a header with the Click & Drop logo and navigation links for 'Your Store - Desktop', 'Your Store', and 'United Kingdom'. A blue banner at the top contains a link to the help guide. Below this, a red asterisk indicates required fields. The main form area includes a 'Trading name' dropdown menu set to 'Your Store', an 'Integration name' text field with 'Your Store - Desktop', and a section for instructions on using the integration. There are four checkboxes: 'Print labels automatically after import', 'Upload labels', 'Orders per printout limit' (set to 50), and 'Upload reports'. A 'Configure printers' button is next to the 'Orders per printout limit' dropdown. At the bottom right, there are three buttons: 'Disconnect', 'Delete', and 'Update'. A 'Cancel' button is at the bottom left.

Configure your application settings

You can access the Click & Drop Desktop application from your system tray or start menu at any time. Once open, the 'Home' tab will be displayed.

Please take a moment to read the on-screen instructions before you change any of your settings.



Click the 'Settings' tab to go to the settings page.

General preferences:

Launch Click & Drop at system startup: Leave this box checked if you wish for Click & Drop Desktop to load up every time you start or restart your computer.

Enable desktop notifications: leave this box checked if you wish for popup notifications to inform you when you import a file successfully.

Import preferences:

Watch directory: This is the folder that Click & Drop Desktop will use to import your orders. It is also referred to as your 'Watch' folder.

Your current 'Watch' folder displayed here. By default, this is set to C:\Users\YOUR USER\AppData\Roaming\Click & Drop™ Desktop\Watch

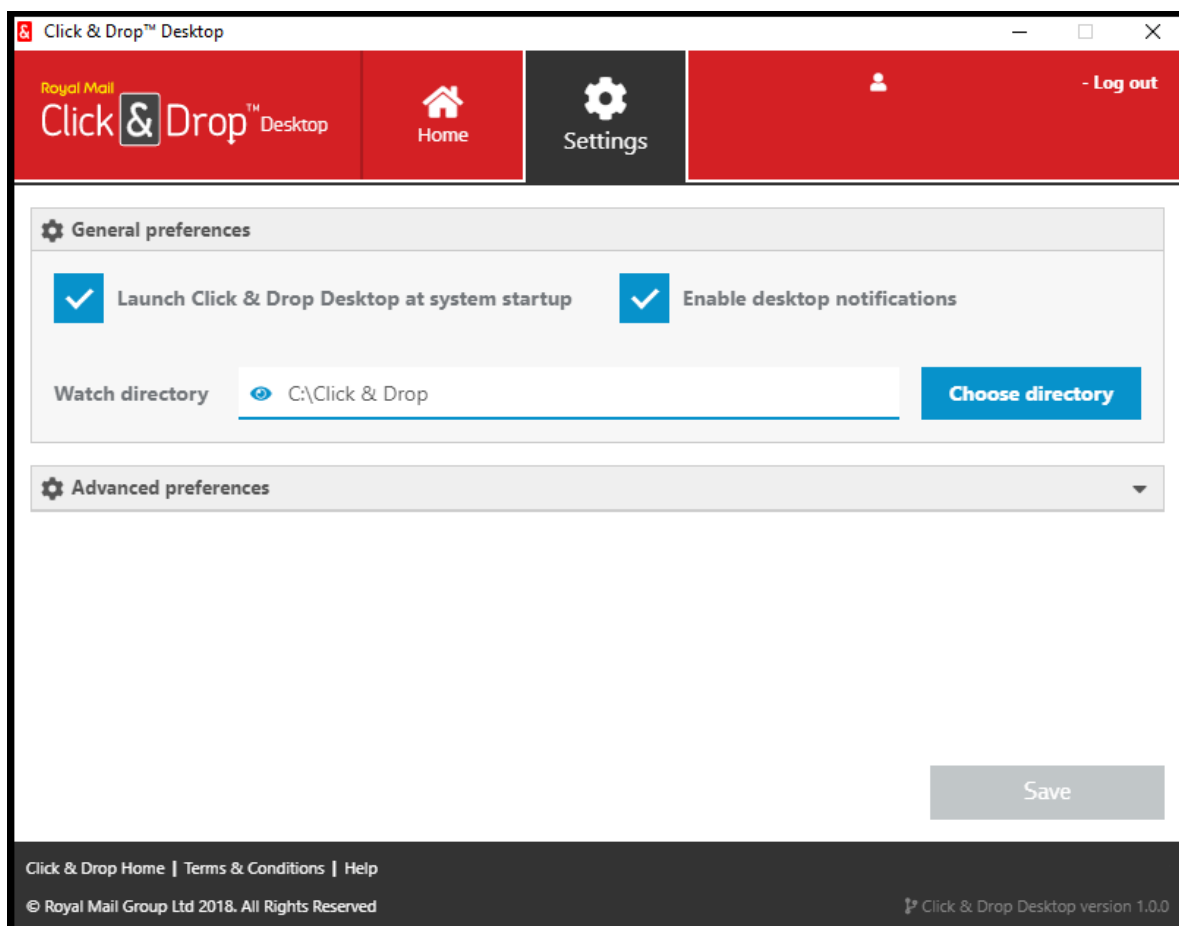
Click the 'Choose directory' button to choose any folder on your computer or network drive. Click & Drop Desktop will watch this folder for your imported files, and will save additional files to this directory as described later in this guide.

Advanced preferences:

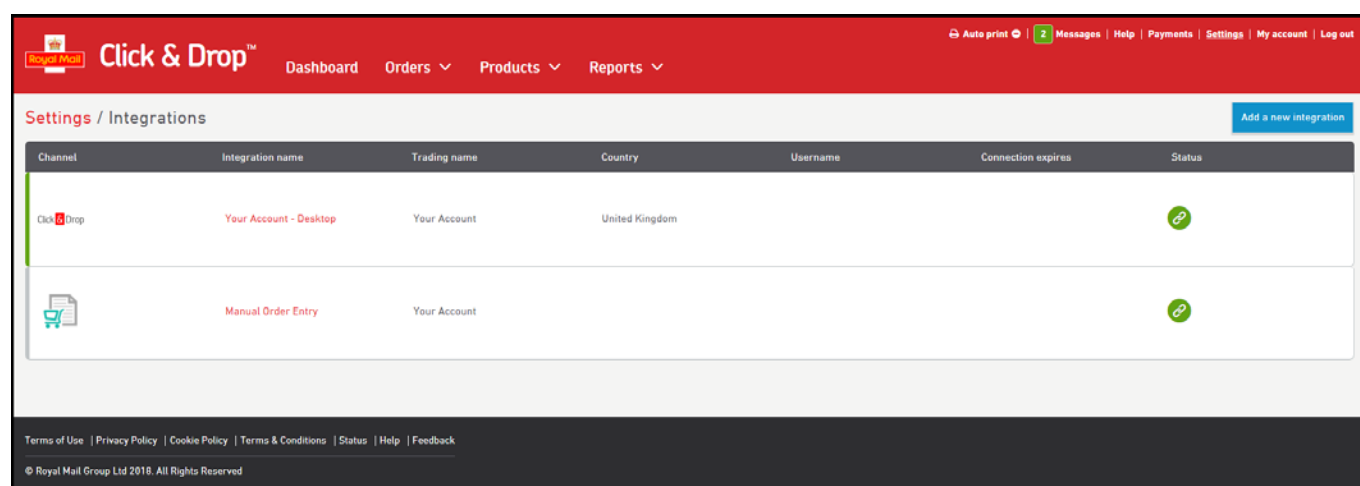
Within this section you will find the 'Polling' option. Use this option only if your 'Watch' folder is on a network location, and not your local computer or device.

If you are not sure, please do not change this setting.

Please note if you see a 'use legacy Dropbox compatibility mode' setting option, please consult the Click & Drop Desktop Dropbox file structure guide for more information before you make any additional changes (see the importing files section on our [Connect your channels and/or import files to Click & Drop help page](#)).



When you navigate back to Click & Drop, the Click & Drop Desktop integration be visible from your 'Settings' > 'Integrations' page.



You are now ready to begin mapping and importing your files.

Mapping your spreadsheet columns.

The first time you import a file into Click & Drop, Click & Drop will remember the order of your columns.

If you have already imported a spreadsheet file containing your orders into Click & Drop either manually, or through our Dropbox integration, you will not need to do anything at this stage, as your files will already be mapped.

If you have not yet imported a spreadsheet file containing your orders into Click & Drop, you will need to perform one manual import now to map your spreadsheet columns.

For more information, please see our guide on [How to import/upload orders](#).

Importing your orders

Once you have installed Click & Drop Desktop, integrated it with your Click & Drop account, and mapped your spreadsheet columns, you will be ready to import your orders.

To import one or more orders, simply place the file into your 'Watch' folder.

After you import your first order, some new folders will have been created within your 'Watch' folder.

Processed: Your successfully imported spreadsheet files will be placed here.

Results: Following an import, a spreadsheet containing Order number, Channel, Channel reference, Printed date, Customer, Tracking number, and Package size columns will be saved here.

If your file contains errors, a description of the error can be found in the file.

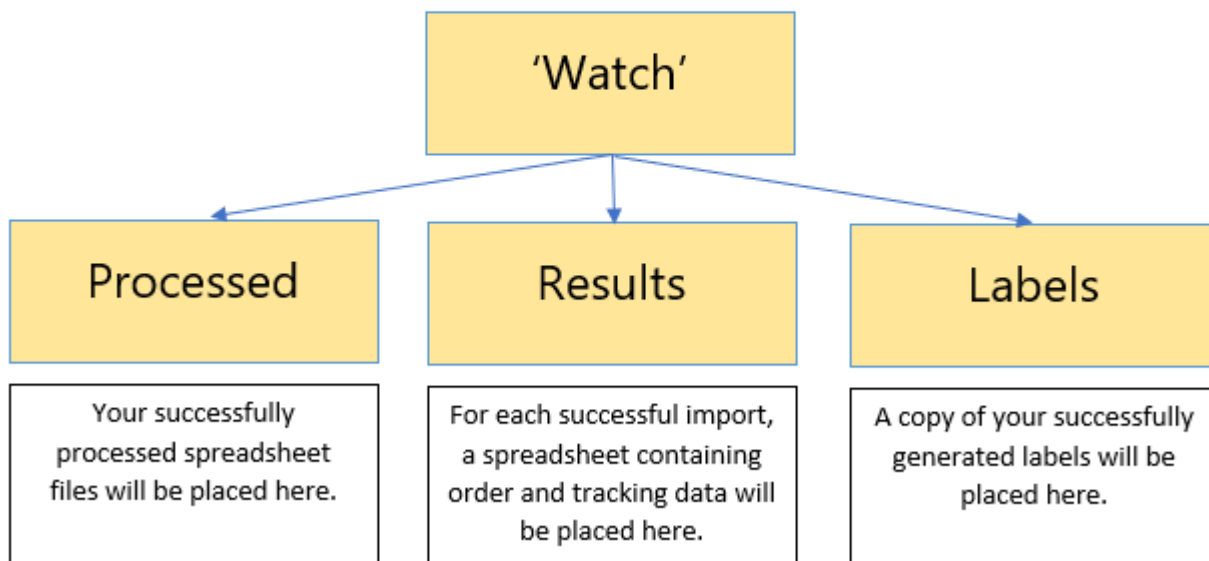
Please note you will need the 'Upload reports' option checked in your integration settings for results files to be saved into your 'Watch' folder.

Labels: A copy of your successfully generated labels will be placed here.

Please note that for a copy of your label to be saved into your 'Watch' folder, you must ensure the following:

1. You will need the 'Print labels automatically after import' option checked in your integration settings.
2. You have [Royal Mail Print Assist](#) installed, and have the 'Enable automatic printing' option checked.
3. You have printers configured within Royal Mail Print Assist (if you process your labels from a single computer or device) OR
4. You have workstations configured within your Click & Drop Desktop integration settings (if you process labels from more than one computer or device).

Please note you may need to periodically clear out and / or archive files from these folders as they become full.



If there is an error with your order import, you will be automatically redirected to the order import history page and informed that the order import failed.

From here, you will be given an explanation of the fault and the option to download the file to fix the fields, or to undo the import.

What the 'Results' file look like

A results file of a successful import in in .CSV spreadsheet format, which can be read as a text file, or viewed in all major spreadsheet editing software.

Example results file viewed in Notepad:

```

20180807032427676.20180807093309475.example-click-and-drop-file_-_despatch_report - Notepad
File Edit Format View Help
Order number,Channel,Channel reference,Printed
date,Customer,Tracking number,Package size
1150,Your Company Click & Drop Desktop,879218,03/09/2018
16:58,Your Customer,3200697860000550E6965,Parcel
  
```

Example results file viewed in Microsoft Excel:

	A	B	C	D	E	F	G
1	Order number	Channel	Channel reference	Printed date	Customer	Tracking number	Package size
2	1150	Your Company Click & Drop Desktop	879218	03/09/2018 16:58	Your Customer	3200697860000550E6965	Parcel
3							
4							
5							

The naming convention the files use

Files places into your processed folder:

yyyy-mm-dd-hh-mm-ss-fff-[[WORKSTATION-<WorkstationName>]]-<OriginalFilename>

Example 1 – WITH workstation: 2018-08-15-15-25-10-231-[WORKSTATION]-data.xls

Example 2 – WITHOUT workstation: 2018-08-15-15-25-10-231-data.xls

Files placed into your Results folder:

yyyy-mm-dd-hh-mm-ss-fff-[[WORKSTATION-<WorkstationName>]]-<OriginalFilename>.csv

Example 1 – WITH workstation: 2018-08-15-15-25-10-231-[WORKSTATION-MARK]-data.csv

Example 2 – WITHOUT workstation: 2018-08-15-15-25-10-231-data.csv

Files placed into your labels folder:

<OrderNumber>[-<ChannelReference>].pdf

Example 1 – WITH channel reference: 1234-abcdef.pdf

Example 2 – WITHOUT channel reference: 1234.pdf

Spreadsheets are saved in .csv format, and labels are saved as .pdf.

Producing CN22/CN23 documents

If you have checked the 'Generate customs declaration with Orders' option in your Label format settings page, then CN22 or CN23 documents will automatically be produced for any international orders imported where customs declarations are required.

The .PDF files will be saved to your **results** folder.

For more on Label format settings see the [How to select your shipping label template](#) section on our [Click & Drop – guide to printing labels and despatching](#) help page.

Disconnecting your Click & Drop Desktop integration

You can disconnect your integration at any time by navigating to 'Settings' > 'Channels and stores'. Click your Click & Drop Desktop integration to expand the integration details, and clicking the 'Delete' button.

If you wish to uninstall the application, you can do so through 'Add/remove programs' on your windows machine.

You can reconnect your Desktop integration at any time by following the above instructions again.